



TEXAS DEPARTMENT OF HEALTH
AUSTIN, TEXAS
INTEROFFICE MEMORANDUM

TO: Herman Horn, Chief, Bureau of Regional & Local Health Operations
Regional Directors
Directors, Local Health Departments
Directors, Independent WIC Local Agencies

FROM: Gerald D. Cannaday, Jr. *Not*
Chief, Bureau of Nutrition Services

DATE: January 26, 2001

SUBJECT: Revised WIC Policies CS: 01.3, CS: 02.1, CS: 03.1, CS: 03.1.1 & CS: 04.4.2

The following policies of the Special Supplemental Nutrition Program for Women, Infants, and Children (WIC) have been revised to comply with United States Department of Agriculture (USDA) requirements:

- Policy CS: 01.3, Time Frames for Processing Applicants,
- Policy CS: 02.1, Residency as a Certification Requirement,
- Policy CS: 03.1, Income Screening as a Certification Requirement, and
- Policy CS: 03.1.1, Adjunctive Income Eligibility
- Policy CS: 04.4.2 Weighing Equipment

Policy CS: 01.3, Time Frames for Processing Applicants will be revised to include guidelines for implementing Procedures II.A. and II.B which are directed at capturing the Date of First Visit (DOFV). As a reminder, the procedures read **as** follows:

- II *The processing time frame begins when the individual visits the LA during clinic/office hours to make an oral or written request for program benefits. This date will be the "Date of First Visit" in person on the Quick Intake Screen of the Texas WIN system.*
- A. *If client visits the clinic in person to request an appointment, check "Y" on the Quick Intake Screen.*
- B. *If client phones for an appointment, check "N" on the Quick Intake Screen.*

The Quick Intake must be pulled up to do a certification in order for the system to record the Date of First Visit (DOFV) accurately. Local agency staff should work toward

ensuring that the Quick Intake is pulled up each time a certification is done when the appointment is set up using the Quick Intake process.

In situations where it is not possible to pull up the Quick Intake to do a certification, staff should use the following guidelines:

- Use the Quick Intake process,
- Print out a hard copy of the Quick Intake form the same day that the Quick Intake is entered using the print screen function, and
- File the hard copy of the Quick Intake form in a tickler file according to the date of the applicant's certification appointment.

For example, Mrs. Jones walks in on November 2 and wants WIC benefits. The clinic is busy so a certification appointment is made. The clinic staff do a Quick Intake on Mrs. Jones and give her a certification appointment for November 10. That same day, clinic staff print out a hard copy of Mrs. Jones' Quick Intake, and file the copy in a tickler file under the date of November 10.

If the applicant returns for the appointment without the required documentation for certification, the local agency will make another appointment and processing timeframes from the initial contact by the applicant will be considered to have been met. At this point, the clock starts over, however, the second appointment still must be made within appropriate processing timeframes. To capture the "revised" DOFV, staff should print out and file the Quick Intake form according to the procedure stated above.

In order to verify the DOFV, a Foxfire report may be run that **will** list:

- the walk in applicants entered through the Quick Intake process, and
- the date they were entered into the system.

In order for the DOFV to appear on this report, the Quick Intake process must have been used, and a "Y" entered to request an appointment on the Quick Intake screen.

Local agencies who need assistance creating a Foxfire report to capture the DOFV may contact the WIC Help Desk at 1-888-922-4484.

If a local agency develops an alternate procedure to comply with Policy CS 01.3, Procedure II.A and II.B, a copy of that procedure must be submitted by **March 1, 2001** to Karen Davis, Director, WIC Policy & Communication Section, for review and approval.

WIC Policy CS: 02.1, Residency as a Certification Requirement, Procedure I.A will be revised to remove drivers license from the list of items that may be used as proof of residency. Participants may continue to use drivers license as proof of identity, but must

supply another form of documentation for proof of residency.

Policy CS: 03.1, Income Screening as a Certification Requirement, Procedure VII.B refers to allowing a homeless person to self-declare income, and requiring that individual to sign a statement specifying why he or she cannot provide documentation of income. The state agency will add or revise a form for use with ~~homeless~~ individuals in order to document their inability to provide proof of income. In the meantime, local agencies may continue to use WIC Form 32 to document homeless individuals' inability to provide proof of income. On the form, the participant should write and sign a statement as to why she cannot provide documentation, such as "I have no documents because I am paid in cash and my employer won't sign a statement".

The next two policy revisions relate to those instances when a participant is reassessed for program eligibility during the certification period, i.e., when the participant's income changes and the participant notifies the local agency during her certification period.

Policy CS: 03.1, Income Screening as a Certification Requirement, Procedure XV.B.I .b relates to participants who forget to bring written proof of income to their next appointment when reassessment of program eligibility occurs during the certification period. This procedure will be revised to require that once a local agency learns from the participant that her income has changed, staff may accept a verbal declaration of income for that visit, issue only **one month of benefits (single issue)**, and require the participant to return with written documentation for the next appointment. If the participant fails to bring the required written proof of income to her next appointment, she will be disqualified from the program.

Policy CS: 03.1 .1, Adjunctive Income Eligibility, Procedure VI addresses reassessment during the certification period, however, Procedures VI.C.1 and VI.C.2 appear contradictory as currently written. Procedure VI.C.I states that verbal declaration of eligibility for gateway programs, i.e., AFDC/TANF and Medicaid, is not acceptable. Procedure VI.C.2 states that if a client fails to bring proof of continued participation in a gateway program or proof of income, the client will be reassessed based on a verbal declaration of income.

The state agency recognizes that these procedures are confusing as written. The procedures will be revised to clarify the intent of procedure VI.C which requires that individuals bring proof of their continued eligibility in a gateway program or proof of income to their next appointment when reassessment of program eligibility occurs during the certification period. This procedure will be revised to require that once a local agency learns from the participant that her eligibility in a gateway program has changed, staff may accept a verbal declaration of eligibility for that visit, issue only **one month of benefits (single issue)**, and require the participant to return with written documentation for the next appointment. If the participant fails to bring the required written proof of eligibility in a gateway program or proof of income to her next appointment, she will be disqualified from

the program.

Policy CS: 04.4.2 Weighing Equipment - Procedure will be added that includes a requirement for annual calibration of scales and the maintenance of documentation of the date of this calibration. Manufacturers have indicated that if scales are zero balanced each time they are used, they should be calibrated annually. Local agencies should identify resources locally to obtain the weights for the calibration (for instance, local hospitals may have weights that can be borrowed). A local agency may choose to purchase the weights. If you have questions about purchasing the weights, or need additional information concerning this procedure, contact Matt Harrington (512) 458-7111 ext. 3503.

Local agencies must implement these policy changes no later than March 23, 2001

As announced to all local agencies in our September 15, 2000 memo entitled, "Request for Comments on Proposed Changes to WIC Policy Process," the Program is working on satisfying the TDH requirements for rule making and policy adoption. Until this process is completed, we are not able to officially amend the WIC Policy and Procedure Manual. Over the next few months we will issue any mandated changes to you, including the changes described in this memo, via the numbered memo process. For those local agencies who may be due for a scheduled review by the state agency during this time, we will not issue any findings for deficiencies related to the policy changes we issue by memo.

If you have any questions, please contact Karen Davis, Director of the WIC Policy and Communication Section, at (512) 406-0711, extension 221.